



OFFICE OF
LEGISLATIVE AUDITOR
STATE OF LOUISIANA
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January 21, 2004

Honorable Francis C. Heitmeier, Chairman
Honorable John A. Alario, Jr., Vice Chairman
Joint Legislative Committee on the Budget
P. O. Box 44294
Baton Rouge, LA 70804

Re: Exceptional Performance and Efficiency Incentive Program
Proposal by the Department of Economic Development,
Office of Business Incentives, Small and Emerging
Business Program

Dear Senator Heitmeier and Representative Alario:

In accordance with Louisiana Revised Statute (R.S.) 39:87.5(D)(8), we have completed our analysis of the material and substantive accuracy of the proposal submitted by the Department of Economic Development (DED), Office of Business Incentives, Small and Emerging Business Development (SEBD) program for a financial reward based on the Exceptional Performance and Efficiency Incentive Program. State law and program rules require our findings to be submitted to the Performance Review Subcommittee no later than January 31. However, since the subcommittee members have not been appointed, our report is being submitted to you to be distributed to subcommittee members once they are appointed.

The DED Small and Emerging Business Development group based its proposal (copy attached) on the exceptional performance of program staff. According to DED's proposal, during fiscal year 2003, SEBD certified businesses exceeded the 2-year survival rate of similar companies by more than the target percentage of 10%. The proposal also states that, according to the Small Business Administration, the national survival rate for similar businesses between 2001 and 2003 was 66%.

We did not verify all items in the proposal. We only verified the data that the department supplied that supported its claims related to exceptional performance. We also reviewed documents that support the amount of its reward request.

In summary, we found the following:

- **DED is seeking a reward in the amount of \$474,525.22.** The reward is split between employee award bonuses for six staff members that total \$24,525.22 and \$450,000 in nonrecurring expenditures. The \$450,000 in nonrecurring expenditures is to be distributed equally (\$50,000 each) among nine intermediaries in the following regions: Monroe/Ruston, Shreveport,

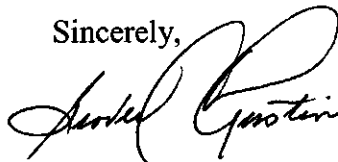
Honorable Francis C. Heitmeier, Chairman
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Alexandria, Lake Charles, Lafayette, Baton Rouge, Ascension, New Orleans,
and Thibodaux.

- **The 2-year survival rates for fiscal years 2002 and 2003 cannot be verified (page 2 of the proposal).** DED was not able to provide sufficient documentation for this performance indicator. Therefore, we cannot determine if the performance indicator is reliable. DED's documentation consisted of a list of businesses that were still certified by the department, but no proof that these businesses were still open.

I hope this information is useful in your legislative decision-making. A copy of this information has been provided to DED.

Sincerely,

A handwritten signature in black ink, appearing to read "Grover C. Austin", written over a horizontal line.

Grover C. Austin, CPA
First Assistant Legislative Auditor

GCA/ss

Attachment

[DEDSEBD04]

Attachment

State of Louisiana



DEPARTMENT OF ECONOMIC DEVELOPMENT

M.J. "Mike" Foster, Jr.
Governor

Don J. Hutchinson
Secretary

November 15, 2003

Performance Review Subcommittee
11th Floor, State Capitol
900 N. Third Street
Baton Rouge, LA 70804

Attention: Elise Read

Dear Ms. Read:

Forwarded for your favorable consideration is an application for an Exceptional Performance and Efficiency Incentive Program Reward as established under R.S. 39:87.5 as part of the Louisiana Government Performance and Accountability Act.

The reward application is on behalf of Louisiana Economic Development's *Small and Emerging Business Development Program* and its staff. We welcome the opportunity to discuss the proposed reward if the Performance Review Subcommittee so requests.

Sincerely yours,

A handwritten signature in cursive script, reading "Don J. Hutchinson".

Don J. Hutchinson
Secretary of Economic Development

Enclosure



LOUISIANA
ECONOMIC DEVELOPMENT



Louisiana Economic Development

BUSINESS SERVICES PROGRAM

DEPARTMENT: SCHEDULE:
AGENCY: PROGRAM:
ACTIVITY:
SUBJECT FISCAL YEAR:

This proposal is for a reward based on exceptional performance.

This original document, plus seven copies, must be received by the Performance Review Subcommittee of the Joint Legislative Committee on the Budget by 5:00 p.m. on November 15th. The Subcommittee's physical address is 900 N. 3rd St., State Capitol, 11th Floor, Baton Rouge, LA 70802; the mailing address is P.O. Box 94486, Baton Rouge, LA 70804; the e-mail address is "reade@legis.state.la.us".

Louisiana Economic Development (LED) recommends that the Small and Emerging Business Development (SEBD) Program and its six staff members receive an exceptional performance reward based upon the achievement of the entire SEBD Program.

For their contributions to the significant increase in productivity, quality and performance of the SEBD program, particularly the exceptional two-year survival rate of SEBD clients, LED requests that each of John Matthews, Richard Broussard, Ken Szuska, Matthew Lambert, Craig Hartberg, and Kathee Stickles be awarded supplemental compensation of the lesser of \$5000.00 or ten percent of their respective annual salaries.

LED further recommends that the SEBD Program be awarded an additional \$450,000.00 to meet the current backlog in demand for assistance for FY 2003-2004.

Application prepared by: Date:

Signature



Agency head approval: Date:

Signature



Received by the Performance Review Subcommittee: Date:

Sent to the Legislative Auditor Date:

Response from Legislative Auditor: Date:

Disposition by Subcommittee: Date:

Part One: Explanation of the Activity and the Exceptional Performance

- A. Provide a detailed narrative description of the subject activity or program(s) and summarize the exceptional performance achieved by that entity.**

Attached Addendum 1

- B. Provide detailed performance data evidencing the exceptional performance represented in your proposal. Be sure to note those specific performance indicators and standards which are particularly important. Provide any separate or narrative background information necessary to highlight or support the exceptional nature of the performance. All proposers must complete Format 1. Format 2 is to be used to report additional data which is not captured in LaPAS.**

Format 1. Provide the LaPAS data using this format, attaching addenda as necessary.

Program (or agency):	Business Services Program					
Objective:	III.1 Through the Small and Emerging Business Development (SEBD) initiative, to exceed the national survival rate of assisted businesses by 10% annually.					
	FY 00-01		FY 01-02		FY 02-03	
Performance Indicators	Standard	Actual	Standard	Actual	Standard	Actual
Number of small businesses certified	50	129	114	123	114	446
Number of applications for certification generated	55	120	125	124	125	429
Number of certified small and emerging businesses provided specific assistance	60	183	117	159	117	272
Number of certified small and emerging businesses monitored.	50	64	50	65	64	240
Percentage by which certified companies 2-year survival rate exceeds similar companies	N/A	N/A	10%	31%	10%	33%

Note: Similar companies' survival rate is 66%, therefore, the actual survival rate of certified companies in 02-03 was 99%, which exceeded the national average by 33%.

Staffing was reduced due to the department reorganization; therefore FY 00-01 standards were reduced. As the fiscal year progressed, targets were adjusted upward.

STAFFING: As a result of legislatively mandated reductions and the reorganization of the department, SEBD staffing was reduced from 11 positions in FY 99-00 to 7 positions in FY 01-02.

C. **Expenditures.** For the subject year and the preceding year, provide the following expenditure data for the program(s) (or equivalent) in which the subject activity occurred, as well as that for the entire agency. *Provide this data using the format below, attaching addenda as necessary.*

		Preceding Year	Subject Year
Program:	Business Services Program	FY 01-02	FY 02-03
	End-of-year actual expenditures	\$35,027,615	\$27,558,467
	End-of-year actual T.O.	28	35
Agency:	Office of Business Development	FY 01-02	FY 02-03
	End-of-year actual Expenditures	\$48,381,814	\$51,332,139
	End-of-year actual T.O.	64	73

PART TWO: ACTIONS OF EMPLOYEES

Complete this Part if the achievements evidenced in your proposal are the result of the efforts of specific employees. Present this information in narrative fashion. You must include the employee names, job titles, and general contribution to the effort.

Attached Addendum 1

PART THREE: EXPLANATION OF PROPOSED REWARD AND ITS USE

I. Aggregate amount of reward requested:

\$474,525.22

II. Explain how the proposed reward funding would be used, whether for non-recurring expenditures or supplemental compensation, or both:

A. Non-recurring expenditures

Request \$450,000 in non-recurring expenditures to be distributed equally (\$50,000 each) among 9 intermediaries in the following regions of the state: Monroe/Ruston, Shreveport, Alexandria, Lake Charles, Lafayette, Baton Rouge, Ascension, New Orleans, and Thibodeaux. The additional funding will enable LED to meet it's FY 2003-2004 backlog of demand by:

- restoring the SEBD program in Monroe, Shreveport and Lake Charles to meet the demand of the 249 SEBD clients in those areas;
- maintaining the \$1,500 per client level of assistance to clients as they progress from initial training to higher levels of assistance;
- increasing the number of clients assisted from the current level of 28% (272) to 50% (485) of certified active clients;
- more accurately assessing the level of demand within the nine geographic regions of the state; and
- insuring highest level of monitoring of the quality and value of the program to its recipients and the state of Louisiana.

B. Supplemental Compensation

Request Supplemental Compensation of the lesser of \$5,000 or 10 percent of annual salary for the following staff members of the Business Services Program:

Name	Annual Salary	Supplemental Comp.
John W. Matthews, Jr.	\$64,733.76	5,000.00
Richard D. Broussard	\$40,123.20	4,012.32
Kenneth Szuska	\$46,342.40	4,634.24
James M. Lambert	\$42,247.40	4,224.74
Craig F. Hartberg	\$39,624.00	3,962.40
Kathee Stickles	\$26,915.20	2,691.52
Total		\$24,525.22

State of Louisiana



DEPARTMENT OF ECONOMIC DEVELOPMENT

M.J. "Mike" Foster, Jr.
Governor

Don J. Hutchinson
Secretary

Addendum 1

The Louisiana Department of Economic Development ("LED") enthusiastically presents "for reward based on exceptional performance" the **Small and Emerging Business Development ("SEBD") Program and its six staff members** in recognition of the Program's performance which consistently exceeds important performance indicators.

SEBD Program

The SEBD Program, mandated by law in 1996, is administered by the Business Retention and Assistance Services Division of LED in accordance with the provisions of R.S. 51:941-945 and the provisions of the Administrative Procedure Act, R.S. 49:950-970, as amended. The purpose of the program is to provide the maximum opportunity for small and emerging Louisiana businesses and business owners to become competitive in a non-preferential modern economy, to improve the small business survival rate, and to retain and create jobs for Louisiana citizens.

The economic development context for the SEBD Program is based upon the positive impact that small businesses have on the U.S. economy, and similarly on the Louisiana economy. According to the Small Business Administration Office of Advocacy, small firms:

- Represent more than 99.7 percent of all employers.
- Employ more than half of all private sector employees.
- Pay 44.5 percent of total U.S. private payroll.
- Generate 60 to 80 percent of net new jobs annually.
- Supplied 22.8 percent of the total value of federal prime contracts in FY 2001 (about \$50 billion).
- Are employers of 39 percent of high tech workers.
- Are 53 percent home-based and 3 percent franchises.
- Made up 97 percent of all identified exporters and produced 29 percent of the known export value in FY 2001.

Following the legislation creating the SEBD Program in 1996, rules were written and the program became functional in 1997. A process of certification in the program and delivery of technical and managerial assistance and training was established. Certified SEBD clients remain in the program for up to seven years, or until their business or personal net worth no longer qualify for the program. Services are delivered to small business owners by consultants, various educational institutions, the SBDC network, and intermediaries around the state of Louisiana. The types of assistance provided to small and emerging businesses include, but are not limited to:

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Phone (225) 342-3000

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M.J. "Mike" Foster, Jr.
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Don J. Hutchinson
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- entrepreneurial training;
- development of a business plan;
- in-house accounting including software and training in its use;
- layout and design of marketing materials, logos, websites, etc.;
- training in the use of special purpose software for contractors;
- development of operating and personnel policies;
- development of legal documentation where required; and
- many other types of technical and managerial assistance needed by the clients.

History

During the five year period of 1997 - 2001, approximately 550 clients were certified into the SEBD Program from around the state of Louisiana. The program was centrally administered in Baton Rouge which involved the creation of numerous direct contracts with consultants around the state. Service delivery was slow and it was difficult to monitor the quality of the contractors and the assistance they provided. Monitoring required significant staff travel.

Prior to the reorganization of LED in 2001, the legislature mandated significant staff reductions in LED that impacted both SEBD staffing levels and SEBD funding. The remaining staff and management began to restructure the SEBD Program to fit its new reality, to respond to its early experience with the program, and to cope with the increasing demand for the program's services.

Originally, to insure that applicants met the requirements for certification in the SEBD Program, the certification process required voluminous documentation. Through experience it was learned that many new and existing small businesses did not understand all these requirements, and in fact needed assistance to develop its financial records, to determine its proper legal form, etc. Because they did not understand how to apply for certification, many deserving and needy clients never made it into the program.

In 2002, SEBD rules were changed to make certification into the program user friendly to its constituents. The initial application process dropped the requirement for voluminous documentation, and the application form is now one page (front and back). The applicant completes the form with appropriate qualifying information and has the application notarized to validate the information contained therein as true and correct. Once certified, the new client schedules a meeting with the nearest SEBD intermediary to assess the assistance needs of the owner and the business. At that time, appropriate financial and legal documentation are collected from the client to document the

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client's qualification for the program. If the client needs help in developing financial information, that need becomes known and the assistance process begins.

In the 18 months since this change in the certification process, the number of SEBD clients certified in the program reached over 1,200, more than double the 550 certifications accomplished during the first five years of the program. Furthermore, more assistance is being provided as evidenced by the increase in number of certified small and emerging businesses provided specific assistance (see Performance Indicators) and by the fact that the SEBD Program is now fully utilizing all the funds appropriated for assistance through the program. The program's credibility among the small business community has soared as a result of this change, and there is clearly a strong demand for the assistance this program provides.

Not as readily visible is the significant reduction in staff time, postage, and paperwork required to process an application. Now, instead of as much as 6 months to process an application, applications are processed daily and applicants receive their certification within one week.

Over 85 percent of the funds provided for the SEBD program go directly to support certified SEBD clients, with less than 15 percent dedicated to administration by the intermediaries. To participate in the SEBD program, intermediaries must have sufficient funding from other sources to support their operations and the administration of the SEBD Program.

LED management and the SEBD staff believe the SEBD Program is appropriately structured and staffed in Baton Rouge to accommodate the growing demand for this service for at least the near term. The critical limit to the program is the level of appropriated funding for client assistance. Due to restricted appropriation of funds, the staff was unable to award SEBD contracts to intermediaries in Lake Charles, Shreveport and Monroe in FY 2003-2004. There are currently 249 certified SEBD clients in these three areas, with a backlog of assistance needs that are not being met.

In FY 02-03, the SEBD Program was only able to provide assistance to 272 SEBD clients (28% of certified active clients). The average cost to the SEBD Program during the period of FY 01 – 03 was just over \$1,500 per client assisted. SEBD clients are required to pay a larger part of the cost to achieve even this relatively modest amount of assistance. The demand from the small business sector clearly requires a greater appropriation of funds to the SEBD Program so that (1) assistance reaches a greater percentage (50% vs current 28%) of the certified active clients, and (2) the amount of assistance per client can increase to keep pace with the increasing cost of assistance as clients progress from initial training to higher levels of assistance as the business grows. So while the program's productivity has been improved substantially, and deserves recognition, the SEBD

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Program does not have sufficient funding to meet the demand of its rapidly increasing client base, which has created a backlog in requests for assistance.

Activities

LED oversight of the SEBD Program is still provided by the SEBD staff, but assistance and training services have been delegated, through a competitive RFP process, to intermediaries around the state (see attached list of the current SEBD Intermediaries). There are many benefits to this delivery system including:

- convenience for the SEBD client;
- the local market knowledge of the intermediary;
- the collaboration with regional economic development entities to leverage services and skills;
- the leveraging of SEBD funding with other regional economic development programs;
- the ability to monitor the progress of SEBD clients in a designated area;
- the value of local networking; and
- many other benefits.

One major accomplishment of the collaboration effort of the staff and intermediaries of the SEBD Program is the close relationship that is developing between the SEBD Program and the Small Business Development Centers ("SBDC"). Instead of competing with one another, SEBD and the SBDC network have begun referring clients to one another in an effort to leverage our respective funds and skills. In several instances the SBDCs are providing Entrepreneurial Training classes for SEBD clients. The SBDCs in Lake Charles, Shreveport, and Monroe all submitted proposals in response to the SEBD 2003-2004 RFP, so when additional funding for the program permits it will be possible to engage these entities as intermediaries for the program. We consider the SBDC network to be a primary ally in providing services to new and existing small businesses.

In addition to simplifying the application process and improving the service delivery system, the SEBD staff has developed a client monitoring process and a client satisfaction survey to improve the quality of the assistance provided by the SEBD Program. The monitoring and quality control programs facilitate the capability to determine the outcomes of the SEBD Program, and program outcomes ultimately reveal the value of the program.

The SEBD client monitoring process is primarily a responsibility delegated to the SEBD intermediaries. Intermediaries are responsible for an initial assessment of a client to determine

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assistance needs and the priority of the needs. In addition, the intermediaries are responsible for performing a certain number of follow-up monitoring calls during a contract year. During assessment and monitoring, financial and employment data is collected which is the source of the program outcomes data. In addition, feed back on the value of the program is collected so the program can meet the changing needs of the small and emerging business community and improve the quality of the assistance provided.

The SEBD staff participates in the monitoring process primarily through two procedures. The staff creates a list from its data base of clients who have not received assistance during the first two years in the program. Those clients are called by SEBD staff to determine the status of the client's business and to collect financial and employment data if necessary. This procedure compliments the intermediary monitoring process, with a goal of the two efforts being to contact all SEBD certified active clients at least one time each fiscal year.

The second way that SEBD staff participates in the monitoring process is by conducting client satisfaction surveys. The SEBD staff conducts a 100 percent sample of clients who receive assistance through the program. This provides validation that service was actually provided, and it also provides feedback regarding the quality of the assistance. These results are documented and reports are generated from the data base indicating the degree of satisfaction for all assistance provided by the SEBD Program. In addition, reports can be created to evaluate service provided by specific intermediaries and sub-contractors, and also for specific types of service provided.

The SEBD staff also directly provides pure business consulting to clients on a daily basis. Numerous telephone calls and e-mails are received daily by the staff. The experience of the staff provides an excellent base for consulting advice to the clients. The six staff members collectively have 46 years experience in economic development, 63 years experience in the private business sector, 37 years in military experience, 5 Bachelor of Science degrees and 4 Masters of Business (MBA) degrees. Their backgrounds include experience in finance, banking, marketing, contracts administration, and sales management. One serves on the BREI Board of Directors (an international economic development organization), and one serves on the Board of Directors and is Chairman of the Audit Committee of a NYSE corporation.

While each of the six staff members have a different professional background, they all share a passion about the importance of the small and emerging business segment to the health and growth of the economy. Each staff member considers it part of his life mission to counsel and assist small business persons, recognizing that entrepreneurship is uniquely American, and entrepreneurship drives the economy. Staff members are routinely told that they provide assistance and insight far

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beyond the expectations of the clients who call the office.

The staff has developed a ***General Business Assistance Information*** document that is an excellent reference document for callers who seek direction to various sources of assistance. This document has been added to the LED website, and it is routinely sent to individuals who are applying for assistance under the SEBD Program.

Achievements

The benefit of these various changes to the SEBD Program, and also of the experience and dedication of the staff, is that with only six staff members (a significant reduction from the years before 2002), the number of certified SEBD clients has more than doubled, the clients are receiving more service, and the quality of the service received is continuously improving. These results can be seen in the performance indicators, and you can hear about the benefit of the program from SEBD clients who are featured in the CD-ROM accompanying this reward recommendation. Both the small business owner and the business benefit from the program.

Perhaps the most significant performance indicator result is the number of SEBD clients who are still in business at the end of two years. The national small business two-year survival average, as documented by SBA and other sources, is 66.34 percent. The two-year survival rate of SEBD certified clients has consistently been over 95.0 percent. This performance is a clear indication that the SEBD Program is providing valuable assistance to small and emerging businesses in Louisiana. The value of improving the business survival rate will become even more evident when funding permits assistance to a larger number of the SEBD certified clients.

The SEBD survival average is even more impressive when considering we have clients who have been in the program since inception, or for nearly seven years. The first cycle of seven years will occur in 2004, at which time clients will begin to cycle out of the program for the first time due to the seven year limitation.

The increase in the number of SEBD certified clients served, the increase in productivity in the program delivery process, the quality and experience of the SEBD staff, and the consistent survival performance that is achieved as a result the SEBD program are the basis upon which this recommendation for reward for exceptional performance is based. We strongly and enthusiastically recommend your favorable consideration of this reward.

**LOUISIANA DEPARTMENT OF ECONOMIC DEVELOPMENT
SEBD CONTACTORS 2003-2004**

MicroBusiness Development Center (MBDC)

Address: 3419 N.W. Evangeline Thruway, Carencro, LA, 70520
Phone: Sherman Malveaux 337-896-4742
Email: sherman@ecol.org

Microbusiness Enterprise Corporation of Ascension – Donaldsonville (MBECA)

Address: P. O. Box 1512, Donaldsonville, LA 70346
Phone: Lee Melancon 225.201.9611
Email: lee@innovatisimc.com

Manufacturing Extension Partnership of Louisiana (MEPoL)

Address: P.O. Box 44172, 241 E. Lewis St. (70504), Lafayette, LA 70127
Phone: Corinne Dupuy 337-482-6714
Email: cdupuy@louisiana.edu

Urban League of Greater New Orleans

Address: 2322 Canal Street, Suite 100, New Orleans, LA 70119
Phone: Patrice Williams-Smith 504.620.9650
Email: paw_s@bellsouth.net

City of Baton Rouge/Parish of East Baton Rouge

Address: 4523 Plank Road, Baton Rouge, LA 70805
Phone: Isaiah Marshall 225-358-4514
Email: imarshall@ci.baton-rouge.la.us

South Louisiana Economic Council (SLEC)

Address: P.O. Box 2048-NSU, Thibodaux, LA 70310
Phone: Deanna Duet 985-448-4485
Email: slec-dmd@nicholls.edu

NewCorp Business Assistance Center

Address: 1600 Canal St., Suite 601, New Orleans, LA 70127
Phone: Vaughn Fauria 504-539-9340
Email: vrfauria@newcorpbac.net

The Alexandria Metropolitan Foundation (AMF)

Address: 5411 Coliseum Blvd., Suite A, Alexandria, LA 71303
Phone: Johnie Varnado 318-442-3593
Email: johnie@kazette.com

JOHN W. MATTHEWS, JR.

1423 Patrick Drive • Baton Rouge, LA 70810 • 225-761-0665 (H) 225-342-1181 (W)

OBJECTIVE

Using my expertise in the scientific and technical fields, coupled with an advanced degree and extensive experience in both the private and public sector, I am striving to continue a career in management.

EDUCATION

MASTER OF BUSINESS ADMINISTRATION (MBA) <i>Loyola University</i>	MAY 1980 <i>New Orleans, Louisiana</i>
BACHELOR OF SCIENCE, BIOLOGY <i>Southern University</i>	AUGUST 1971 <i>Baton Rouge, Louisiana</i>
ST. AUGUSTINE HIGH SCHOOL	MAY 1967 <i>New Orleans, Louisiana</i>

EMPLOYMENT

Economic Development Manager <i>Louisiana Department of Economic Development</i>	SEPT. 2003- PRESENT <i>Baton Rouge, LA</i>
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Assistant administrator of Business Assistance and Retention Services. Primarily responsible for the Small Business Services Initiative which provides managerial, technical and indirect financial assistance programs for the small business community throughout the State of Louisiana. Duties include: 1) Developing the strategic direction of specific programs; 2) Implementing, promoting and overseeing the operation of programs consistent with the strategic direction; 3) Managing the Bonding Assistance Program; 4) Supervising, coaching and training the professional staff; 5) Representing the State of Louisiana as a speaker and panelist on a national and statewide level regarding Small Business Services

DEPUTY ASSISTANT SECRETARY* <i>Louisiana Department of Economic Development</i>	SEPT. 1997-SEPT. 2003 <i>Baton Rouge, Louisiana</i>
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Assistant administrator of the Division of Small and Emerging Business Development (SEBD) which provides managerial, technical and indirect financial assistance programs for small and disadvantaged businesses throughout the State of Louisiana. Duties include: 1) Developing the strategic direction of SEBD; 2) Implementing, promoting and overseeing the operation of specific programs consistent with the strategic direction; 3) Managing the Bonding Assistance Program; 4) Supervising, coaching and training the professional staff; 5) Representing the State of Louisiana as a speaker and panelist on a national and statewide level regarding SEBD programs.

MANAGER,
SMALL BUSINESS BONDING ASSISTANCE PROGRAM
Louisiana Department of Economic Development

FEB. 1997 - SEPT. 1997
Baton Rouge, LA

Responsible for directing and managing the Bonding Assistance Program on a daily basis. Required to help contractors acquire the managerial and technical skills necessary to enable them to obtain bid, payment and performance bonds from surety companies. Responsible for planning, scheduling and implementing the Louisiana Contractors Accreditation Institute. Required to conduct meetings and conferences with various organizations to discuss operational issues, organizational budgetary matters, personnel matters, technical issues and status of associated projects. Charged with the management of a \$2 million fund that is utilized as collateral to surety companies to assist contractors in obtaining bonds. Responsible for the development of current and long-range programs, plans, policies and rules.

COMPLIANCE OFFICER
Governor's Office - Executive Staff

AUG. 1993 - FEB. 1997
Baton Rouge, LA

Appointed and commissioned by the Governor of the State of Louisiana to the Governor's Office of Urban Affairs and Development. Duties include coordinating, directing and monitoring programs targeted for disadvantaged and urban residents in the state. Responsible for providing, promoting and organizing legislative initiatives and economic development programs. Charged with coordinating information to and among the various private and state agencies, advising the Governor on issues relative to urban and disadvantaged citizens' affairs, assisting the Office of the Governor in constituent services and other functions as requested.

ASSISTANT TO THE PRESIDENT
Texaco Inc.

OCT. 1991 - JUL. 1992
Houston, TX

Assistant to the President of a major oil company's natural gas marketing group. Involved in all activities associated with marketing natural gas throughout the United States. Responsibilities include the oversight of sales, purchases, transportation and gas control. Also responsible for department budgets, strategic planning, recruiting and implementation of various activities.

MANAGER - NATURAL GAS SALES AND PURCHASES
Texaco Inc.

FEB. 1985 - OCT. 1991
Houston, TX

Direct supervision of a group engaged in all aspects of marketing 1.2 BCF/D of natural gas to traditional pipeline companies, local distribution companies and end-users. Primarily concerned with developing marketing strategies compatible with corporate objectives as well as negotiating settlements of major contract disputes. Responsible for directing and training personnel to ensure implementation of marketing strategies and proper administration of sales contracts. Position required thorough knowledge of the natural gas industry.

GAS REPRESENTATIVE
Texaco Inc.

FEB. 1981 - FEB. 1985
New Orleans, LA

Charged with the responsibility and supervision of the Federal Energy Regulatory commission (FERC) group concerned with all matters related to the maximum lawful pricing of natural gas within the jurisdiction of the New Orleans Division (Contracts Administration). Accountable to Division Management for company's compliance with the Natural Gas Policy Act (NGPA) of 1978 and for external as well as internal communications related to gas pricing. Direct supervision of all employees within the

group including Gas Contract Analysts, Regulatory Clerks, and varying numbers of temporary personnel.

GAS CONTRACT ANALYST
Texaco Inc.

AUG. 1980 - FEB. 1981
New Orleans, LA

Concerned with all matters that affect segments of the natural gas industry regulated by the NGPA. Duties include knowledge of the NGPA and what must be done to comply with this regulation. Functions also encompass written communications to joint interest owners over Division Manager's signature and coordination of interdepartmental activities to ensure the efficient flow of information and correct billing of subject sales.

ENGINEER'S ASSISTANT
Texaco, Inc.

DEC. 1977 - AUG. 1980
New Orleans, LA

Planning and coordinating projects with the engineering group. Involved in the planning and implementation of training programs for plant personnel. Responsible for compiling and writing scheduled reports submitted to the Division Office. Exposed to budget and cost control; experienced in gas measurement; involved in administrative duties as seen fit by the Plant Superintendent.

CHEMIST
Texaco, Inc.

JUN. 1973 - DEC. 1977
New Orleans, LA

Problem solving and trouble shooting in the area of industrial chemistry. Exposed to gas and liquids chromatography, distillations, wet chemistry and monitoring of water treatment programs. Familiar with various types of tests conducted in a gas processing plant.

LABORATORY TECHNICIAN
Texaco, Inc.

MAR. 1972 - JUN. 1973
New Orleans, LA

Routine quality control work utilizing gas chromatography to analyze and monitor gas processing plant's liquefied petroleum gas products.

**Note- Effective October 17, 2001, as a result of the restructure of the Department of Economic Development, the position of Deputy Assistant Secretary was eliminated. Currently, as Coordinator of the SEBD program, responsible for many of the same functions as that of Deputy Assistant Secretary.*

REFERENCES

Available upon request.

Richard D. Broussard
6213 Parterre Drive
Baton Rouge, LA 70817
225 342-1940

JOB OBJECTIVE: Business Retention & Assistance Manager position in a situation in which academic credentials and business experience will be of benefit.

EDUCATION: UNIVERSITY OF SOUTHWESTERN LOUISIANA, Lafayette, La.
1981-85 Master of Business Administration (MBA) degree, December 1985, GPA 3.6/4.0
1974-78 Bachelor of Arts (BA) degree, December 1978, Political Science major and English minor

EXPERIENCE:
September 2001 Business Retention & Assistance Services Coordinator, Business Retention & To Assistance Services, LOUISIANA ECONOMIC DEVELOPMENT (LED), Baton Rouge, La.
Present
Consult with business owners/operators, bankers, attorneys, & accountants on securing loans, loan guarantees, venture capital investments and business incentives. Review business plans and financial statements. Develop, monitor, and supervise departmental contracts. Serve on the Business Retention & Expansion International (BREI) Board of Directors and the LA Purchase Venture Capital Forum Planning Committee. Also on LED Customer Service Committee and Safety Committee. Hold certifications from BREI, EX-IM Bank, Auditor ISO 9000, and the Venture Capital Institute

January 1999-
September 2001 Research Analyst, OFFICE OF POLICY AND RESEARCH LOUISIANA DEPARTMENMT OF ECONOMIC DEVELOPMENT, Baton Rouge, La.
Reported directly to the research supervisor and director of research. Responsible for conducting international, national economic, business, financial, political, and demographic research and analysis.

September 1997-
July 1998 Assistant Vice President -Commercial Lending, ST. MARTIN BANK & TRUST COMPANY, St. Martinville and Lafayette, La.
Reported directly to the President and Chairman of the Board of Directors. Responsible for originating, closing, servicing, and working out business loans; packaging U.S. Small Business Administration (SBA) loans; analyzing financial statements; and counseling small business owners on financial and management issues.

June 1992-
September 1997 Loan Officer, LOUISIANA ECONOMIC DEVELOPMENT CORPORATION, Baton Rouge, La.
Reported directly to the Executive Director. Responsible for evaluating the viability and risk associated with commercial loans submitted by banks for consideration of loan guarantees, performing sophisticated analyses on financial statements, credit-scoring loans, rendering recommendations on loans, presenting loans to a nine-member board of directors and an in-house loan committee, and working out problem loans.

Conducted seminars and workshops for entrepreneurs, bankers, accountants, attorneys, economic development practitioners, and exporters. Counseled small business owners on financial and management issues.

August 1989-
June 1992

Educator, LAFAYETTE PARISH SCHOOL BOARD, Lafayette, La.

Reported directly to the school Principal. Taught English, science, biology, math, and physical education courses as a substitute teacher.

September 1986-
August 1989

Executive Director, LAFAYETTE CENTRE CERTIFIED DEVELOPMENT COMPANY, Lafayette, La.

Served as the Executive Director of a private nonprofit corporation certified as a lender in the SBA 504 Loan Program. Responsible for the administrative management of the organization, tax reporting, evaluating the viability and risk associated with fixed asset business loans, performing sophisticated analyses on financial statements, rendering recommendations on loans, presenting loans to a nine-member Board of Directors and a loan committee, closing and servicing loans, and functioning as a liaison between the Board of Directors and the SBA.

Also served as loan officer, financial analyst, and accountant for various other private nonprofit small business revolving loan funds including the Lafayette Neighborhoods Economic Development Corporation.

Served on the Board of Directors of the International Trade Development Group whose primary objective was promoting exports from south Louisiana through the International Business Exchange, an event best described as a one-on-one matching of domestic and foreign business people.

Conducted business seminars for entrepreneurs, bankers, accountants, attorneys, and economic development practitioners. Counseled small business owners on financial and management issues.

January 1984-
September 1986

Photographer, BROUSSARD PHOTOGRAPHY, Lafayette, La.

Self-employed as a photographer while pursuing graduate degree studies full-time.

1981-1984

Counselor/Coordinator, LAFAYETTE PARISH GOVERNMENT/U.S. DEPT. OF LABOR, Lafayette, La.

Reported directly to the Executive Director. Responsible for the administrative management of a public sector program that provided vocational training to more than one hundred thirty (130) economically disadvantaged individuals yearly. The annual operating budget for the program totaled \$377,000.00.

1980-1981

Laboratory Manager/Technician, CATALYST RECOVERY, INC., Broussard, La.

Reported directly to the Plant Manager. Responsible for performing quantitative analyses on petroleum catalysts. Supervised plant personnel on quality control procedures in the lab.

PUBLICATION: Richard D. Broussard and Dr. Dalton E. Brannen, "Credential Distortions: Personnel Practitioners Give Their Views," Personnel Administrator, June 1986.

REFERENCES: On request

Kenneth J. Szuszka

4027 Secretariat Drive
Baton Rouge, LA 70816

Education:

Milwaukee Institute of Technology – Associates degree in Chemical and Metallurgical Technology

U.S. Army Logistics Management Center – Operations Research/Systems Analysis (ORSA) School Graduate

University of Wisconsin – B.S. in Mathematics

McNeese State University – Masters in Business Administration

Louisiana Public Management Program – Management in State Government, Level I-III

Work Experience:

Field Artillery Officer, United States Army	1965 - 1986
Market Analyst	1991 - 1993
Economic Development Research Analyst	1993 – 1998
Economic Development Research Director	1998 – 2001
Economic Development Small Business Advisor	2001 – Present

Computer Software Skills:

Wordperfect, Lotus 123, dBase, Microsoft Excel, Microsoft Word, Microsoft Access, Microsoft PowerPoint, MapInfo GIS, Goldmine, Stonefield Query Report Writer

MATTHEW LAMBERT

44258 Calvin Templet Road
St. Amant, LA 70774
225-647-2499

EDUCATION:

Southeastern Louisiana University, Hammond, LA
B.A., Marketing, Minor, Business Administration, 1971
Louisiana State University, Baton Rouge, LA
Post Graduate Studies in Psychology, 1972
Economic Development Institute Graduate, '95-'97, Norman, OK

MILITARY:

U.S. Army, 8/69 - 5/71, Military Police (Confinement Spec.)
Attended schools (3) in Ft. Gordon, GA. Assigned to Ft. Belvoir, VA

EXPERIENCE:

Economic Development Small Business Advisor 3

Administer the Small & Emerging Business Development Program (SEBD) as well as serve as a business advisor for small businesses in general (as assigned). The SEBD Program provides some funding for technical & managerial assistance to certified small and emerging businesses through contracts with intermediaries throughout the state and the Small Business Advisor monitors these contracts. The above is accomplished by:

- Promoting and explaining the certification process, requirements, and the benefits of being SEBD certified.
 - Monitor Intermediaries contracts that administer the program throughout Louisiana.
 - Assess business assistance needs and refer appropriately if not provided by SEBD.
 - Contact SEBD clients for rating on the consultant and if authorization was completed.
 - Plan, organize and participate in meetings, workshops, trade show and seminars in order to educate and advocate for the Small & Emerging Business Program.
 - Answer and respond with information about general business assistance inquiries for startup, expanding, and retaining businesses.
 - Answer numerous inquiries about grants, financing, and loan information sources.
 - Coordinate for Louisiana the International Council of Shopping Centers (ICSC) Gulf South Alliance Program partnering with Mississippi and Alabama, as assigned by Governor.
- Louisiana Economic Development (LED) , Baton Rouge (May 2001-Present)**

Economic Development Specialist 3

Stimulate a market for jobs by inducing new industry to expand or locate in Louisiana and existing industry to expand or to retain existing industry; work an assigned territory of Arkansas, Mississippi, Alabama, Florida, and Tennessee for recruiting and in-state parishes of St. Martin, Iberia, Vermilion for in-state marketing. Accomplished by the following:

- Visits to in-state parishes assigned economic developers, resident industry executives, elected officials, etc., providing information on state assistance programs and tax incentive programs
- Coordinate and arrange meetings with local officials, state officials, and state agencies (i.e., Mayors, Governor's Office, DEQ, R&T, etc.)
- Coordinate site visits by corporate officials to Louisiana communities for a first hand look at buildings and/or "greenfield" property sites

- Prepare proposals; providing information on buildings and sites relative to the project and providing information on tax incentive programs
 - Conduct four prospecting missions annually outside of Louisiana (i.e., visits to corporate offices; trade shows, etc.); requiring much pre-planning and follow-up
 - Continuous follow-up information to prospects (taxes, labor, training)
 - Working knowledge of computers including Microsoft Office Products
- Department of Economic Development (DED), Baton Rouge (July 1996-May 2001)**

Business Development Specialist 2

- Worked directly with start-up, existing, expanding and distressed Louisiana businesses to assist them in operating in Louisiana
 - On site visits to businesses discussing operations and current projected needs
 - Areas to be examined were; problems the business had, expansion or downsizing plans, need for financing or other assistance from DED
 - Reviewed state, federal, and company's actual needs
 - Followed-up in writing and took appropriate action
 - Coordinated Technology Transfer between federal laboratories and business
 - Helped conduct meetings, trade shows, etc., related to promoting state's incentives
 - Became familiar with network computer system (WordPerfect, E-Mail, Lotus)
- Department of Economic Development (DED), Baton Rouge (Feb., 1993-July, 1996)**

Purchasing Agent 3

- Responsible for the purchase of equipment., supplies and commodities for the school
 - Drafted specs for equipment. and/or commodities purchased or for needed renovations
 - Supervised a staff of employees in the operation of the Purchasing Department
 - Supervised the operation of a fully maintained receiving/storage warehouse facility containing a very diverse variety of perpetual inventory items
 - Responsible for initiating and verifying the annual inventory of all state property and equipment in accordance with Louisiana Property Assistance Agency, Division of Administration
 - Maintained maintenance and service agreements for computers, business and office equipment, pest control, refuse collection, and other service agreements
- Louisiana School For the Deaf, Baton Rouge (September, 1990 - February, 1993)**

Purchasing Agent

- Duties included purchasing of industrial supplies and equipment: bidding and renewals of service contracts such as elevator maintenance, garbage pickup, janitorial, security, computer controls, and pest control
 - Dealt with specifications of contracts, insurance requirements, bond requirements
 - Used IBM 3191 computer for vendor information, commodity coding, state contract pricing
 - Prepared memos and letters, and handled extensive telephone communication with vendors and other state agencies in Louisiana
- Office of State Buildings, Baton Rouge (October 1988-September 1990)**

Purchasing Agent

- Purchased items for Bookstore, Food Service, Snack Bar, Departments on Campus
 - Handled processing of purchase requisitions
 - Sent out bids according to rules and regulations of the State of Louisiana for service contracts, repair and maintenance projects, equipment maintenance contracts, food servicing contracts for cafeteria, equipment (computers, printers), and purchases dealing with Auxiliary Services-Dealt with budgets and adjustments
 - Used Honeywell C-6 computer and microfiche
- Southeastern Louisiana University, Hammond, LA (March 1988-October 1988)**

Outside Sales Representative

- Representative of paper products and janitorial supplies, calling on the industrial market in the River Parishes area
- Duties included finding the right people to converse with and then their specific needs
- Quoted prices according to bidding process, and also did research on specific odd items for various industrial needs which included intensive telephoning of companies to verify handling of these products

Broussard Paper, Gonzales (November 1987-March 1988)

Sales Manager

- Involved with 15 retail stores owned by Gonzales Music Wholesale
- Sales of records and tapes and music accessories to retail stores in six state area
- Duties included intensive telephone communication with managers and buyers of retail outlets, obtaining new customers, working with distributors from national companies, *managing employees including buyers, drivers, billers, inventory control shippers*
- Worked with the purchasing of inventory, gave seminars to retail outlets on how to motivate employees and obtain new business; also did small amount of purchasing

Gonzales Music Wholesale, Gonzales (July 1977-May 1987)

Outside Sales Representative

- Representative of industrial supplies and machines tools covering Baton Rouge and west of the Mississippi River

Oliver H. Van Horn, Baton Rouge (July 1974-July 1976)

Outside Sales Representative

- Representative of heavy equipment in Southwest Louisiana area (Lake Charles)
- Special training: attended schools in Wisconsin

Midco Louisiana Company (July 1973-June 1974)

Salesman

- Sales in men's clothing and sporting goods department

Goudchaux's Department Store (May 1972-June 1973)

Craig F. Hartberg

344 Highland Park Drive · Baton Rouge, Louisiana 70808
HOME: (225) 769-2485 · WORK: (225) 342-5882 · EMAIL: chartberg@cox.net

Summary of Qualifications

Over twenty years of commercial banking experience in commercial lending and management utilizing: Credit underwriting skills to evaluate existing and new credit request; Interpersonal skills to attract, motivate and retain strong team members; Consultative sales skills to increase service to existing customers and to expand the customer base; and financial planning and analysis skills to impact bottom line performance. Computer Software Skills: Microsoft Word, Microsoft Excel, and Microsoft PowerPoint, Lotus 1-2-3/Works

Work Experience

Louisiana Department of Economic Development Small Business Advisor	2001 – Present
Rockview Financial Services, Inc., Baton Rouge, LA Louisiana Licensed Mortgage Loan Originator	2000 – 2001
Bank One, Texas, N.A., Dallas, TX First Vice President (Senior Housing Finance)	1991 – 2000
Team Bank, Dallas, TX (Purchased by Bank One) Senior Vice President / Manager Private Banking	1989 – 1991
First City Bank – Valley View, Dallas, TX President / Chief Executive Officer	1981 – 1989
Texas American Bank – Dallas, Dallas, TX Senior Vice President / Commercial Lending	1975 – 1981
First National Bank in Dallas, Dallas, TX Commercial Lending Officer	1972 – 1975

Education

Southern Methodist University – Southwestern Graduate School of Banking
University of Wyoming, Laramie, WY
Degree: **M.S. – Business Administration**
B.S. – Business Administration

Business Service Involvement

“Capital Senior Living Corporation” (NYSE-CSU) – Board of Directors,
Chairman Audit Committee

KATHEE STICKLES

1142 Sharynwood Drive
Baton Rouge, LA 70808
(225) 766-6853

EMPLOYMENT HISTORY

Executive Secretary for Deputy Secretary of Department of Economic Development

Executive Secretary for Director of Business Resources and Services, DED

Executive Secretary for Director of Military Services and Assistance, DED

Executive Secretary for Human Resources, Information Services, Fiscal, DED

General Duties include: Confidential Secretary; Arranging schedules, preparing editing letters, handling logistics of travel, preparing expense accounts, etc. Coordinate Director's and staff travel, including arranging meetings, arranging hotel accommodations and all travel; coordinates office functions, etc. Maintain and update weekly schedules and reports. Screens telephone calls/visitors; respond to routine correspondence, organizes and maintains central files; reviews, prioritizes incoming mail and directs to appropriate staff. Handles office staff functions for section and members (including Directors). Assign duties and functions of student worker(s). Perform all routine office functions for staff, i.e. typing, filing, supplies, fax dissemination, etc. Backup for Promotion Closet procurement. Handle information requests from advertising. Safety monitor for floor and hurricane liaison for building. (Held three Executive Secretarial positions -Deputy Secretary, Policy & Research, & International Marketing - concurrently during re-organization process.)

Executive Secretary for Deputy Undersecretary Policy & Research, Dept. of Economic Development:

Confidential Secretary to Deputy Undersecretary and entire Policy/Research Division staff and International Marketing staff. Arranging schedules, preparing editing letters, handling logistics of travel, preparing expense accounts, etc. Coordinate Director's and staff travel, including arranging meetings, arranging hotel accommodations and all travel; coordinates office functions, etc. Maintains and updates weekly schedules and reports for OPR & Int'l staff. Screens telephone calls/visitors; respond to routine correspondence, organizes and maintains central files; reviews, prioritizes incoming mail and directs to appropriate staff. Handles office staff functions for two sections and members (including Directors). Assign duties and functions of student worker(s). Handle payroll for both Int'l and OPR sections and backup payroll for C&I division. Perform all routine office functions for staff, i.e. typing, filing, supplies, fax dissemination, etc. Backup for Promotion Closet procurement. Handle information requests from advertising. Safety monitor for floor.

Receptionist for Agency- Department of Economic Development:

Answer all incoming phone calls to Agency. Handle scheduling of conference rooms. Handle phone duty assignments for reception desk. Handle dissemination of agency cars. Also detailed to Communications Director to help when necessary for job requirements. Payroll for all student workers in agency.

Administrative Secretary - Department of Economic Development, International Marketing Division

Duties Include: Confidential Secretary to Director of International Marketing; also mgr/sec to entire division staff. Arranging schedules, preparing editing letters, handling logistics of extensive foreign travel, preparing expense accounts, etc. Coordinate Director's and staff travel to foreign countries, including arranging meetings with foreign officials, arranging hotel accommodations and all travel; coordinates office functions for staff while overseas, etc. Maintains and updates weekly schedules and reports for staff. Screens calls/visitors; respond to routine correspondence, organizes and maintains central files; reviews, prioritizes incoming mail and directs to appropriate staff. Handles office staff functions for four staff members (including Director). Assigns duties and functions of student worker(s). Performs all routine office functions for staff, i.e. typing, filing, supplies, fax dissemination, etc. Handles all mailouts for Japanese newsletters. Handles information requests from advertising. Does all payroll - which includes tracking, organizing, and all data input.

Executive Secretary - Louis Reames, A.I.A. Architect & Associates, Baton Rouge, LA

Duties Include: Confidential Secretary to Chief Architect & President. All office correspondence; prepare and type detailed specifications for architectural building construction plans & projects; organize bids for building projects and bid processing; type all legal contracts and agreements; process blueprints for site projects & specifications for each building project; light drafting; handle office bookkeeping, including billing system, statements, writing checks and documentation; prepare proposals for bid projects; organize filing system for records and architectural plans; handle phones; handle office supplies.

Administrative Assistant - Scholarship Grant Division, Office of Student Financial Assistance.

Duties Include: Confidential Secretary to S/G Division Director; handled all mail and distribute to each section; handle all incoming phone calls; handle setting up all work orders for data processing; handle requesting supplies and distribution of same; handle filing for director; enter data processing for scholarship applicants, high school grade reports; handle tracking (i.e. SRF's SA Uploads, H.S. Certification, H.S. problems); Telephone calls, mail workorders, mail 93-94-95-96 processing; prepare payroll; type correspondence, tables, instructions, forms, etc., for division. Also monitors budget, work orders, maintain files. Screens telephone calls either by answering or referring to appropriate area. Maintain publication files. Coordinates large mailouts. Maintain and update Policy Manual. Prepares other correspondence, tables, instructions for other sections in division. Maintains calendar of travel, meetings, workshops, conferences and make travel arrangements, processes travel authorization and expense forms. Set up, document, and compile NASDA policy, information, and membership booklet.

Administrative Assistant - Office of the Louisiana Oil Spill Coordinator, Office of the Governor

Duties Included: Confidential Secretary to Oil Spill Coordinator. Setting up a complete new office (computers, supplies, furniture, etc.) a variety of administrative tasks such as screening telephone calls and visitors; responding to inquiries verbally and in writing concerning agency functions; making travel arrangements; typing correspondence, reports, notices and other documents. Maintain hardcopy files and records; property and/or inventory control; scheduling meetings and conferences; requisitioning supplies and equipment; run day to day office.

Secretary II - Oil Spill/Emergency Response - Dept of Environmental Quality

Duties Included: Organized office; handled all activities such as setting up and maintaining files and records; requisitioning and purchasing for setting up of office supplies, equipment, furniture, and computers; preparation of payroll and personnel records; organizing appointment calendar; making travel arrangements; type correspondence, forms, etc., using word processor and PC; coordinate activities of other personnel; edit correspondence and /or reports for administrators review; sorted mail, screened visitors and telephone calls, handled "Emergency Hot Line" calls for the DEQ; processed to other divisions, trained "Beeper Duty" personnel; processed E-mail calls.

Clerk Typist II - Third Party / Medicaid Recovery Health Services, Dept. Of Health & Hospitals

Duties Included: Clerical/Secretarial; handled all office correspondence for Unit (consisting of 9 people); copied letters, forms, etc. Handled telephone for all personnel; handled mail and distributes to unit. Handled setting up, copying files, and filing records.

Teacher (Substitute) for East Baton Rouge Parish School Board

Duties Included: Teaching all levels of elementary education; lesson planning for teachers on extended leave of absence; organizing short term lesson plans. Also, had extended teaching assignments for Guidance classes, Physical Education classes, and Library.

Secretary/Insurance Manager - Drs. Link, Lutton, & Westhoven, Urology Associates, Toledo, OH

Duties included: Receptionist for incoming and outgoing patients: scheduling of patients appointments and hospital bookings; office correspondence for all doctors; prepared statements and billing procedures for office; filed all insurance claims and processed for patients; posting of payments either from insurance companies or patients; prepared and processed collection letters on past due accounts.

Assistant Secretary - Prudential Insurance Agency, Toledo Ohio

Duties included: Various office functions, filing insurance policies, office correspondence, teletype operations, day to day office duties.

Insurance Consultant & Typist - United Services Automobile Association, San Antonio, Texas

Duties included: Review for verification and confirmation insurance applications for Personal Articles Policies, Personal Articles Floaters, Household Goods Policies, etc. Translated Dictaphone correspondence, memorandums, and policies for insurance representatives.

EDUCATION / TECHNICAL TRAINING

*Kilgore Junior College - Major: Journalism
San Antonio College-Major: Business Administration
Word - Office 2000, Excel, WordPerfect 6.1, Lotus 1-2-3
Various Secretarial Seminars
Indoctrination to Architecture
State-wide Leadership Training (Girl Scouts)
Various Short Courses for Teaching Methods*

Volunteer Activities:

*Girl Scouts: Leader for 12 years, Service Unit
Chairman, Trainer for Leaders, Day Camp Organizer, Day
Camp Trainer, Leader, Cookie Chairman / Sustaining
Membership Chairman
PTA: Vice President, Corresponding Secretary
Yearbook Chairman (three years)
Fundraising Committee Chairman
Boy Scouts: Den Mother for three years
Lynnewood Village Civic Association: President 3 years
Secretary for 2 years*



LOUISIANA
ECONOMIC DEVELOPMENT

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